



Executive Summary

Coalitions *as a* Tool *for* Advocacy

Evidence and
Lessons Learned

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Funders seeking to invest in broad social and system change frequently partner with advocacy organizations to advance issues through policy change rather than solely resourcing direct service organizations. Many funders take this investment further and seek to support coalition building instead of simply resourcing individual organizations. Coalitions are viewed as being stronger than their individual components and, at best, can bring together a variety of voices and positions to advance an issue. Given the current chaotic political environment, it is important to understand how coalitions are currently functioning in the advocacy ecosystem.

To stay abreast of this changing environment and be better positioned to effectively respond, the Bill and Melinda Gates Foundation (BMGF) has an active Learning Agenda to guide the work of its Global Policy and Advocacy Division (GPA). Building on previous work on advocacy coalition capacity, BMGF commissioned TCC Group to conduct research to help funders better understand key considerations in supporting coalitions.

The research draws on three broad data sources:

Interviews: TCC Group conducted 24 interviews with three groups of stakeholders – BMGF staff, peer funders, and coalition experts (outside of those selected for case studies).

Case Studies: TCC Group conducted five virtual site visits, each with a coalition showcasing a unique approach or model of work.

A Literature Review: TCC commissioned three independent researchers to review the available academic and peer-reviewed literature on coalitions.

Data were collected and analyzed using a four-part framework. Each part of the framework represents a domain of positioning in a coalition’s environment. The four domains are: coalition capacity and structure, coalition context, coalition support, and coalition strategy (see Figure 1). When all four areas are being effectively developed and considered by stakeholders, it should lead to effective positioning of the coalition as a whole. Stakeholder development of and attention to all four areas should lead to effective positioning of the coalition.

Figure 1



Simplified Coalition Effectiveness Framework

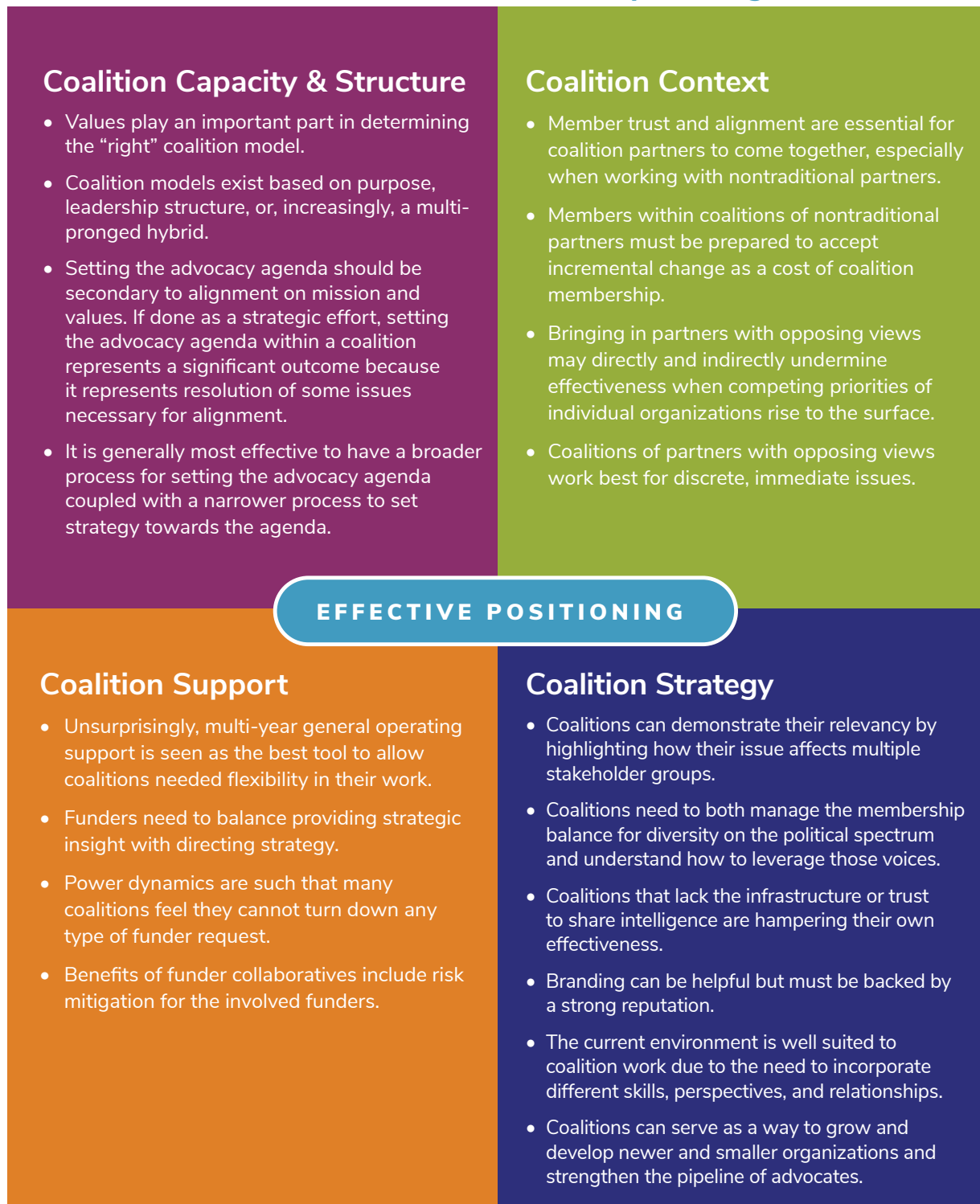
A compilation of the data listed above, this report is primarily directed at funders and is intended to provide insights into when, how, and why to support coalitions under different circumstances. Advocates may similarly find value in some of the concepts and findings to inform their conversations with current and potential funders.

Key Findings

Key findings from each of the capacity domains are depicted in Figure 2 below.

Figure 2

Coalition Effectiveness Framework and Key Findings



Conclusions

Overall, some key best practices emerge across the various sections of the study, along with recommendations for funders:

The importance of understanding coalition context (internal and external). Funding decisions are not made in a vacuum. Rather, program officers need to understand the context in which each potential coalition grantee is operating, including coalition actors, the political landscape, etc. Only with this full context can a program officer understand a coalition's strengths and weaknesses to better inform how to fund and support the coalition. Funders can understand internal and external context most effectively by:

- Learning from peer funders
- Developing relationships with members of the coalition independently as well as with the coalition as a whole
- Mapping how the coalition fits into the overarching theory of change/theory of influence
- Ensuring a good fit between the coalition and the funder
- Setting realistic benchmarks for success and effectiveness tailored to the political context

A willingness to prioritize the coalition as the expert, and the funder as a supportive partner. Coalitions need a certain flexibility in their funding to do the work in the way that they feel is most effective. This includes being able to change strategies, advocacy targets, and even goals as needed to respond to the political environment. Funders must be willing to allow coalitions to take the lead on responding to shifts, including awarding them the financial and grant flexibility they require to do so. They can do this by:

- Only creating a new coalition with deep consultation from field experts
- Providing resources to support internal learning so coalitions are able to report on more accurate metrics and learn in the process
- Not worrying if a coalition doesn't look like a traditional coalition as long as their work is grounded in a strong advocacy analysis
- Making funder role(s) explicit
- Playing a role in agenda formation – although there should be some care for funders acting in this space

Understanding that most decisions related to coalitions have tradeoffs. Funders can ask coalition partners to include a strategy, which may be at the expense of effectively utilizing other strategies; or a funder may emphasize adding non-traditional partners, which comes at the expense of deepening trust with pre-existing partners. Funders should examine their requests with an understanding of what the full implications of those benefits and drawbacks are likely to manifest in the given coalition. Key considerations for funders include:

- Short-term investments in a policy area are unlikely to be catalytic for funders with short-term investments in an area.
- There can be unforeseen consequences for funder actions, even somewhat removed from the coalition space.

Good intentions are not enough when working with coalitions to navigate equity issues. Be thoughtful and deliberate when considering equity issues. Many funders and coalitions have made missteps that have led to harm when trying to bring on partners from excluded groups. Funders can be proactive in this area both through the requests of the coalition (such as their plan to include historically marginalized organizations) and by providing specific support to important organizations that might be marginalized due to their perceived capacity limitations. This can include capacity-building support, legitimizing support (e.g., grant dollars that the organization can allocate to others), and positioning support, such as highlighting their work and publicly asking for their input. Funders should reflect on the following points:

- Funders cannot just mandate a diverse coalition without providing resources.
- Funders and coalition members may not have the knowledge and skills to address racial equity on their own.
- Funders and coalitions cannot dance around issues of racial equity.

While this report provides fresh insights for funders resourcing coalitions, the landscape is frequently shifting. We believe additional inquiry is needed, especially around the ways coalitions are able to incorporate evidence into strategy development and how federally focused coalitions can best leverage and mobilize grassroots voices.



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